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## Planning Basics for Outdoor Learning, Off Site Visits and Learning Outside the Classroom

### Your Plan

Planning should reflect your establishment's procedures, employer's requirements, legal requirements and good practice. You should ensure that:

- All leaders and participants, have a clear understanding of their roles and responsibilities, including their role in the risk-benefit management process.
- Parents have been fully informed and, where necessary, consent has been obtained.
- Any third party providers or facilities have been appropriately selected, in line with the employer's requirements.
- Contingency arrangements (Plan B) have been prepared, where needed.
- An effective emergency plan and designated emergency contact(s) are in place and will be available 24/7.
- All details of the visit/activity are accessible to the emergency contact throughout the period of the activity.

### Start with expected aims and benefits

Identify clear aims and benefits: Answer the WHAT, WHO, WHY, WHERE and WHEN questions. In other words be clear about what you want to achieve, with whom and why. A clear understanding of aims makes it easy to identify suitable choices for many other aspects of planning (such as venue, transport, competence of leaders, preparation of the group etc). Identifying the potential benefits is essential in making sound judgements as to whether the plan is sensible, acceptable and viable.

### Develop Operational Procedures

It is very sensible for an establishment to develop standard operating procedures for regular, routine visits and activities. Where this is not the case then all visits

and activities, however simple and local, will require specific planning and risk management. This is an unnecessary burden for Visit Leaders.

You can find further guidance on how to do this in document 1b '*Foundations*'.

## Consider the Variables

The degree of complexity of visit planning and management will depend on the interplay of several variables. These variables can be remembered as "**SAGE**" and include:

- **S**taffing: who is needed/available? The plan must work within the limits of available numbers, abilities and experience.
- **A**ctivities to be undertaken: what do you want the group to do and what is possible?
- **G**roup characteristics: prior experience, abilities, behaviour and maturity, any specific or medical/dietary needs.
- **E**nvironment: indoors or out; a public space or restricted access; urban, rural or remote; quiet or crowded; within the establishment grounds, close to the establishment or at a distance and the ease of communications between the group and base. Do not overlook environments to be passed through between venues. For residential visits consider the accommodation and surrounding area. For outdoor environments, consider remoteness, the impact of weather, water levels and ground conditions.

